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Attorneys for Plaintiffs

UNITED STATES DISTRICT COURT
CENTRAL DISTRICT OF CALIFORNIA

DAWN SOARES, TIFFANY SOARES,
et al.,

Plaintiffs,

vs.

COUNTY OF LOS ANGELES,
SHERIFF JIM MCDONNELL, et al.,

Defendants.

CASE NO: 2:17-cv-00924-RGK-AS

**DECLARATION OF JAYDA
MACCASKIE IN SUPPORT OF
UNOPPOSED MOTION FOR
APPROVAL OF MINOR'S
COMPROMISE OF S.V. AND J.V.**

*[Filed concurrently w/ Unopposed
Motion for Approval of Minor's
Compromise; Declaration of Dennis E.
Wagner; and [Proposed] Order]*

DATE: May 7, 2019

TIME: 10:00 a.m.

CRTRM: 540

Magistrate Judge Alka Sagar

1 I, JAYDA MACCASKIE, declare as follows:

2 I am a Plaintiff in the subject lawsuit, and also am Guardian Ad Litem for
3 the children who are also Plaintiffs in the subject case and am the moving party for
4 this Minor's Compromise before this court. My children are Alissa Varnedoe, who
5 has since reached the age of majority since the death of her father, and minor
6 children, J.V. and S.V. I am familiar with this lawsuit and issues of this case and
7 have personal knowledge of the facts set forth herein and if called to testify could
8 do so competently based upon my own personal knowledge.

9 1. That J.V. is currently in the 11th Grade and was born in May 2002. Her
10 father is Leroy Genaro Varnedoe, aka, Michael Soares. S.V. is in the 8th Grade and
11 was born November 2005 and her father is Leroy Genaro Varnedoe, aka, Michael
12 Soares.

13 2. Both of the girls instantly struggled with issues concerning the loss of
14 their father after the incident occurred. They have not sought any medical
15 attention, or counseling as a result, nor is any such treatment necessary. Both girls
16 are doing well in school with J.V. maintaining a GPA of 2.98 and S.V. maintaining
17 a GPA of 3.09. All of the girls are set to receive monies as part of the settlement.
18 The minors are set to receive funds via an annuity. For J.V. (**Exhibit "1"**) and
19 S.V. (**Exhibit "2"**), attached and incorporated herein is a true and correct copy of
20 the payouts.

21 3. That my family has retained a financial advisor who has worked with us
22 in the past. Wayne T. Slappy is with Steel Peak Wealth Management, 21650
23 Oxnard St., Suite 2300, Woodland Hills, California 91367. Attached as **Exhibit**
24 **"3"** is a true and correct copy of his CV and materials from the Steel Peak website.
25 He is prepared to take the income listed under the proposals for S.V. and J.V. and
26 the settlement funds of Alissa, to utilize those funds in various investments such
27
28

1 that the children may be in a better financial position than they would be without
2 having a personal financial advisor and simply having an annuity. I believe that
3 the funds for both the minors are better utilized by an individual financial planner
4 in whom we have trust, as opposed to the annuities which are spread out over
5 time, which are well below market and economic conditions for the growth that
6 the monies can receive with our financial advisor.

7
8 4. That I will ensure that the minors and Alissa, once they receive the
9 funds, utilize the financial services of our advisor. I believe this is in the best
10 interests for my girls.

11 5. On behalf of my girls and all of the other Plaintiffs, we are all in
12 agreement as to the funds to be provided to the minors and to the Adults as
13 Plaintiffs. I believe that good cause exists to allow for the approval of the
14 minor's compromises for J.V. and S.V. as requested.

15
16 I declare under penalty of perjury under the laws of the state of California
17 and the United States of America, that the foregoing is true and correct.

18 Executed this 21st day of March 2019 at Santa Clarita, California.

19
20
21 

22 JAYDA MACCASKIE
23
24
25
26
27
28

Exhibit “1”

OBJECTIVE SETTLEMENT ADVISORS

RINGLER

Everybody Wins



(619) 231-3334

Fax (619) 231-3335

Proposal A for J.V. minor

<u>BENEFIT</u>	<u>COST</u>	<u>GUARANTEED YIELD</u>
<u>J.V. Minor</u>		
Female, Date of Birth: 05/02		
<u>Annual Income</u>		
\$36,830.70 per year guaranteed 4 years starting at Age 18 on 5/2020.	\$144,304.78	\$147,322.80
TOTALS	\$144,304.78	\$147,322.80

*Rate Series = PR021319 (2/12/2019)**Proposal Preparation Date: 3/21/2019**Proposal Purchase Date: 6/3/2019**This proposal is valid for 7 days from the proposal preparation date.**This proposal design is for illustration and planning purposes only, and is not valid or binding until verified with the appropriate life company quoting software.**Please refer to our disclosure/disclaimer statement at <http://ringlerassociates.com/disclosures>.*

Minor's Compromise Attachment for J.V.

\$144,304.78 is to be used, with the court's permission, to purchase an annuity, in which **MetLife Assignment Company, Inc.** (hereinafter "ASSIGNEE") will provide for the following Periodic Payments to be made by **Metropolitan Tower Life Insurance Company** (hereinafter "ANNUITY ISSUER"), rated A+ XV by A.M. Best. The details of the periodic payments will be set forth below. All sums set forth herein constitute damages on account of personal injuries and sickness, within the meaning of Section 104(a)(2) of the Internal Revenue Code of 1986, as amended.

TO PAYEE: J.V. - DOB: 05/██/2002

\$36,830.70 payable annually, guaranteed for 4 years, beginning at Age 18 on 05/██/2020, with the last guaranteed payment on 05/██/2024.

The future payment amounts outlined above are guaranteed based upon a projected annuity purchase date of **June 3, 2019**. Any delay in funding the annuity may result in a delay of the payment dates or change in payment amounts that shall be recorded in the settlement agreement and release, qualified assignment document and annuity contract without the need of obtaining an amended Court Order.

FUNDING INSTRUCTIONS:

Premium:	\$144,304.78
Check payable to:	MetLife Assignment Company, Inc.
Tax I.D.	38-4035918

Plaintiff acknowledges and agrees that the Defendant and/or the Insurer may make a "qualified assignment" within the meaning of Section 130(c) of the Internal Revenue Code of 1986, as amended, of the Defendant's and/or the Insurer's liability to make the periodic payments required herein. Any such assignment, if made, shall be accepted by the Plaintiff without right of rejection and shall completely release and discharge the Defendant and the Insurer from such obligations hereunder as are assigned to the ASSIGNEE. The Plaintiff recognizes that, in the event of such an assignment, the ASSIGNEE shall be their sole obligor with respect to the obligations assigned, and that all other releases that pertain to the liability of the Defendant and the Insurer shall thereupon become final, irrevocable and absolute.

If the liability to make the periodic payments is assigned by way of a "qualified assignment:"

- A) Periodic payments from the ASSIGNEE cannot be accelerated, deferred, increased or decreased by the Plaintiff;
- B) The ASSIGNEE does not provide to the Plaintiff rights against the ASSIGNEE that are greater than those of a general creditor; and
- C) The ASSIGNEE's obligation for payment of the periodic payments is no greater than the obligation of the person originally liable (whether by suit or agreement) for payment and from whom the obligation was assigned.

The sole obligor of the Periodic Payments, whether it is the Defendant, the Insurer, and/or the ASSIGNEE, reserves the right to fund the liability to make the Periodic Payments by purchasing an annuity through the ANNUITY ISSUER. The Defendant, the Insurer, or in the event of an assignment the ASSIGNEE, shall be the sole owner of the annuity and have all rights in it. Said owner of the annuity may have the ANNUITY ISSUER, mail payments directly to the Plaintiff. Plaintiff shall be responsible for maintaining a current mailing address for Payee with the ANNUITY ISSUER.

The obligation of the Defendant, the Insurer, or in the event of an assignment, the obligation of its ASSIGNEE, to make each Periodic Payment shall be discharged upon the mailing of a valid check in the amount of such payment to the designated address of the Payee.

All parties shall cooperate fully and execute any and all documents which may be necessary to complete the requirements for the Structured Settlement.

- If the defendant or insurer exercises the right to assign the periodic payments to the assignee, then said party shall sign ASSIGNEE'S assignment document as the assignor.
- If the defendant or insurer does not exercise the right to assign the periodic payments to the assignee, then said party shall sign the application for the annuity as the owner.

Beneficiary designation: Before the minor reaches the age of 18

☐ Court approval is required for any change to the beneficiary designation until the minor reaches the age of 18. *(Default option unless name is competed in option below.)*

== OR ==

☒ The following person is authorized by the Court to exercise death beneficiary designation rights on behalf of the minor:

Jayda Mac Caskie

The initial beneficiary designation is:

☒ The Estate of **J.V.** *(Default option unless section below is competed.)*

==OR==

☐ Primary _____ %

☐ Primary _____ %

☐ Secondary _____ %

☐ Secondary _____ %

Exhibit “2”

OBJECTIVE SETTLEMENT ADVISORS

RINGLER

Everybody Wins

(619) 231-3334

Fax (619) 231-3335

Proposal A for S.V. minor

<u>BENEFIT</u>	<u>COST</u>	<u>GUARANTEED YIELD</u>
<u>S.V. Minor</u> Female, Date of Birth: 11/██/05		
<u>Annual Income</u> \$42,018.70 per year guaranteed 4 years starting at Age 18 on 11/██/2023.	\$144,304.78	\$168,074.80
TOTALS	\$144,304.78	\$168,074.80

*Rate Series = RB190315 (3/15/2019)**Proposal Preparation Date: 3/21/2019**Proposal Purchase Date: 6/3/2019**This proposal is valid for 7 days from the proposal preparation date.**This proposal design is for illustration and planning purposes only, and is not valid or binding until verified with the appropriate life company quoting software.**Please refer to our disclosure/disclaimer statement at <http://ringlerassociates.com/disclosures>.*

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TO PAYEE: S.V. – DOB: 11/██/2005

\$42,018.70 payable annually, guaranteed for 4 years, beginning at Age 18 on 11/██/2023, with the last guaranteed payment on 11/██/2027.

The future payment amounts outlined above are guaranteed based upon a projected annuity purchase date of **June 3, 2019**. Any delay in funding the annuity may result in a delay of the payment dates or change in payment amounts that shall be recorded in the settlement agreement and release, qualified assignment document and annuity contract without the need of obtaining an amended Court Order.

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☒ The Estate of **S.V.** *(Default option unless section below is competed.)*

--OR--

☐ Primary _____ %

☐ Primary _____ %

☐ Secondary _____ %

☐ Secondary _____ %

Exhibit “3”

WAYNE SLAPPY

MANAGEMENT PROFILE

Sales and Marketing • Client Service • Analysis and Finance

Assertive and results-oriented manager leveraging notable history of surpassing profit goals by conceiving and initiating creative business development plans. Adept at performing competitive analyses to ascertain company's position within the local business economy in order to discern need for policy and procedure modifications. Skill for establishing, training, and motivating cohesive teams, emphasizing the importance of a customer-first mindset in all aspects of sales and account management.

CORE COMPETENCIES

- Investment Analysis
 - Recruitment and Training
 - Employee Relations
 - Performance Evaluation
 - Community Relations
 - Business Development
 - Asset Management
 - Loss Prevention
 - Regulatory Compliance
 - Risk Analysis / Reporting
 - Computer Proficiency
-

PROFESSIONAL EXPERIENCE

Steel Peak Wealth Management – Woodland Hills, CA

2015-Present

Wealth Advisor

Transitioned to a fee-based advisory platform and continue to grow steadily

Build and maintain a book of financial planning, wealth management and insurance clients. Educate and advise clients around multiple aspects of their financial life including investments, insurance, debt structure, cash flow and budget analysis, and estate planning. Active in the community through local chambers of commerce and other networking organizations, often holding a board or senior position. Charity and philanthropy interests extend from supporting local charities through donations to volunteering and fundraising.

WADDELL & REED – Sherman Oaks, CA

2012-2015

Financial Advisor

Grew scratch book of business from zero to one of top performing in the office

Built and maintained a book of financial planning, wealth management and insurance clients. Educate and advise clients around multiple aspects of their financial life including investments, insurance, debt structure, cash flow and budget analysis, and estate planning. Developed and implemented new sales strategies to both support the community and grow the practice. Conducted educational seminars for CPAs, professionals, and veterans. Train and develop new advisors on best practices and ethical behaviors. Active in the community through local chambers of commerce and other networking groups, often holding a board or senior position. Charity and philanthropy interests extend from supporting local charities through donations and volunteering and fundraising.

MISSION VALLEY BANK – Sun Valley, CA

2011-2012

Business Development Officer / VP

Pivotal in recreating the investment services relationship between the bank and a local brokerage.

Build and maintain a base of prospects and new clients. Built over \$8MM pipeline in 8 months. Develop sales strategies and networking opportunities. Create and conduct solution presentations and final proposals for qualified prospects as a final step in establishing financial relationships. Uncover needs of prospects and provides information about Bank products and services that can enhance client's financial position. Collaborate with Relationship Managers with the closing of deals and the implementation of banking services. Interact with branch colleagues to discuss prospects and referrals and formulate sales strategies. Develop and manage relationships with small to intermediate-sized business banking relationships with moderate complexity. Responsible for growth including loans, deposits, and fee income. Customers tend to have complicated lending requirements often involving term loans and/or revolving credit lines.

CITIBANK – Vista, CA

2008-2011

Branch Manager / VP

Attained several investment licenses while developing a team with modest experience.

Responsible for leading a team of sales and service professionals to meet and exceed sales goals and service targets. Strategic growth based on maintaining existing customers and new business development. Directly work with customers to uncover and satisfy their financial needs. Ensure the operational excellence of the center and maintain the highest level of customer service. Lead by example by greeting customers, directing them to the appropriate areas of the center, and ensuring that the customers' needs are met. Observe team in action "through the eyes of the customer." Supervise and coach teams on proper execution of key processes while role modeling the desired behaviors. Sell to individual customers and manage overall aspects of running an efficient and productive financial center. Periodically communicate with area executives, review center performance assessments and update staff on business developments. Responsibilities:- Continually improve financial center performance, operational excellence and associate proficiency- Create workforce stability by cultivating an engaged, spirited and well coached team.- Drive sales to meet and exceed sales targets

Key Achievements:

- **Augmented total branch deposits by 23%** in first 9 months in position through assertive sales and marketing techniques.
- **Exceeded deposits growth targets 8** consecutive quarters.
- **Increased Net Checking Growth by 25%** in 2009.
- **Improved Cross Sell Ratio by 200%** in 2009 vs. 2008.

FIRST FEDERAL BANK OF CALIFORNIA – Marina Del Rey, CA

2006-2008

Branch Manager / VP

Instrumental in maximizing branch success through strategic business development and management techniques.

Provide essential leadership to seven-member team committed to outstanding, personalized customer service. Oversee every sector of operations, ensuring stringent adherence to organizational policies and industry regulations. Develop new accounts through informative sales presentations and phone consultations. Evaluate investment prospects and pursue opportunities after conducting intensive risk analyses. Generate and distribute reports outlining account activity and cash flow, discerning areas needing particular attention.

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- Selected to serve on Good to Great Council; implemented expertise to revamp mystery shop program, collaborate in hiring process changes, created a community service network of employees to leverage a measure our efforts for CRA requirements, and develop weekly interoffice newsletter to improve executive communication.

EDUCATION AND CREDENTIALS

Bachelor of Business Administration: Finance Emphasis (1999)

University of San Diego School of Business – San Diego, CA

Dean's List

Series 6, 63 and 65 Investment Licenses

CA Life and Health License

PROFESSIONAL ASSOCIATION

LAX Coastal Area Chamber of Commerce (2004 to 2008)

Westchester Rotary Club

Board member (2006 to 2008)

Vista Chamber of Commerce (2008 to 2011)

Greater San Fernando Valley Chamber of Commerce

Rotary Club of Greater Van Nuys

Leukemia and Lymphoma Society

All Cities Network

LOGIN

COMMITTED

WEALTH MANAGEMENT FOR YOU

Financial Peace of Mind

WAYNE SLAPPY

MANAGEMENT PROFILE

Sales and Marketing • Client Service • Analysis and Finance

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Rotary Club of Greater Van Nuys

Leukemia and Lymphoma Society

All Cities Network

LOGIN

Wealth Advisors

Firm

Strategic Partners

Senior Partners

Wealth Advisors

Dedicated Personnel



Wayne specializes in retirement and comprehensive financial planning. He is a Financial Planning Manager and Vice President with over 20 years of experience in the industry. He has been a wealth advisor for over 10 years, where he has been helping clients with their financial goals ever since. Prior to joining Stearns, he was a wealth advisor at Waddell & Reed, a division of Sun Life of Canada in San Diego where he earned his Master's in Business Administration with an emphasis in Finance. As a wealth advisor, he is also a frequent speaker at financial conferences in Los Angeles, and a moderator for the National Financial Planning Association.

His philanthropic endeavors include serving on the board of the Lymphoma Society and providing support to veterans and underprivileged communities. In his free time, he enjoys playing golf and being outdoors with his family, Bruce.

LOGIN

Wealth Management Capabilities

Overview

Personal Financial Planning

Asset Management

Debt Management

College Savings

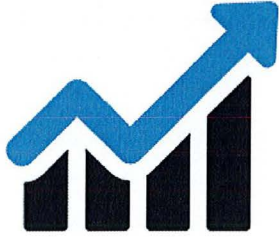
Estate Planning

Retirement Planning

Insurance

Tax Management

Corporate Services



LOGIN

Personal Financial Planning

Building a roadmap to financial stability gives you the freedom to pursue your lifetime goals from living comfortably in retirement to contributing to charity and preserving your legacy for future generations.



Asset Management

With the guidance of a skilled asset manager, your hard earned dollars can grow and begin to work for you, long after you have worked for them.



LOGIN

Debt Management

Debt is a powerful tool that must be carefully used in financial planning. Our planners can assist you in managing debts and find where debt fits into your long-term plans, so that you can leverage opportunities.



College Savings

Determining how to save for your child's education can be one of the trickiest aspect of financial planning.



LOGIN

Estate Planning

Estate planning ensures that you can continue to contribute to your family after you can no longer care for them.



Retirement Planning

Retirement should be exciting and free of financial stress. We can offer a retirement plan that addresses your specific needs and concerns.



[LOGIN](#)

Insurance

We partner with leading insurance providers, ensuring your advisor access to the best life, health, disability and long-term care insurance policies available.



Tax Management

Taxes are a hidden component of every financial decision and action. Our advisors can help you manage your taxes and make financial decisions that minimize tax consequences.



LOGIN

Corporate Services

Businesses and business owners have planning needs that differ from typical individuals. We offer corporate planning services that complement personal planning services for business owners.

HOME ▪ ABOUT ▪ SERVICES ▪ PHILANTHROPY ▪ RESOURCES ▪
CONTACT US

21650 Oxnard Street, Suite 2300, Woodland Hills, CA 91367 ▪ T 818.835.8720 ▪ F 818.835.8730

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